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ABSTRACT

Problems in evaluating the success of an institutional resource development program are examined and suggestions are offered for effective assessment. Such a program is seen as a sequence of events in the artful management of people, from the planning stage to obtaining a financial commitment in writing from persons who want to share their assets for the benefits of others. Certain conditions are identified under which the development officer and the development program will not suffer low productivity ratings. Twenty-five additional factors are identified which will contribute to the institution's failure in its development program. Evaluation of a development program must include the intangible criteria of pride of accomplishment in preparing for a better, warmer understanding of mission and services of the institution by a larger number of people. Success is tested in terms of successful communication to all constituents. The importance of person-to-person meetings is emphasized. (LBH)

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EVALUATING A DEVELOPMENT PROGRAM

Arthur C. Frantzreb

There is no magic way to evaluate the success of an institutional resource development program. From the beginning it is a sequence of events in the artful management of people -- from the planning stage to obtaining a financial commitment in writing from persons who want to share their assets for the benefit of others.

Withal, the descriptions of procedures, materials and techniques, the development function is one of human engineering for an intangible product to meet leadership, financial, and service goals to assure and even insure, the availability of such services for others largely unknown and unseen.

The satisfactions and rewards of accomplishment are qualitative. A small gift from a difficult even recalcitrant prospect may provide greater reward and promise of greater potential then raising 15 per cent more than last year's annual fund. The commitment of ten deferred gifts where there may have been none could provide greatest hope for the future. Yet trustees, treasurers, faculty and staff erroneously expect that the development function can be measured only in terms of annual cash funds in hand. Such expectancy is as illogical as expecting every college student to become a seven-figure donor within a year of graduation.

Evaluation begins with expectancy. Miracles do not just happen in administration, in sales or in philanthropic giving; they must be engineered. Only to the extent to which they are engineered with reason, patience, thoroughness, commitment, understanding and hard work can they be measured. Success doesn't just happen.

Productivity is an illusive criterion whether applied to faculty/staff, research, business operations or general administration. The institutional development officer, however, is in a particularly vulnerable position for testing in fact rather than by hope. It is mandatory therefore that the criteria for judgment be fair to all lest any shortfall be the first responsibility of the judges.

The development officer and the development program will not suffer low productivity rating if:

1. the organization is ready or intends to get ready for a progressively aggressive philanthropic sales program;

2. the positions and functions are properly described to and planned for by trustees;

3. the candidate development personnel are thoroughly researched before retention as to proven sensitivity, personality and executive capacity not just experience in moving from one job to another;

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4. the trustees, all administrators, all faculty/staff leaders understand the teamwork requirements for total institutional success not just development office success;

5. the alumni/constituency, public relations, news bureau, publications personnel understand that their function is justified only in terms of payoff in the development program for both leadership and financial support as the payoff for greater understanding and awareness;

The institution will have failed in its development program:

1. if 100 percent of the governing board are not consistent, proportionate contributors to the annual fund program - a part of the required budget income which they approve in advance;

2. if 100 per cent of the sponsoring groups, development council or committee, are not contributors to the annual fund;

3. if 100 per cent of the senior administrators are not contributors to the annual fund;

4. if a planned giving (deferred gift) program is not established in the first year and sustained almost at all costs;

5. if the annual fund is not an institution-wide record of annual support as a central gift receiving and accountability fund for annually recurring gifts;

6. if the top 100 prospects are not identified and researched, and studied as to interests and potential;

7. if the most promising 10 per cent are not carefully studied and scheduled for involvement and communication, and the top one per cent are not identified and researched for very special handling;

8. if all publications and communications maintain a business-as-usual posture omitting articles, statements and reports on financial need requirements, gifts received, volunteer leadership, and the role of private support;

9. if the records and research office is not adequate to meet information retrieval requirements of volunteers and staff;

10. if development office personnel view their job as essentially internal rather than external;

11. if volunteer leadership is enlisted for their name's sake rather than for action-oriented influence and affluence benefit as authenticators and advocates;

12. if receipt, recording and acknowledgment procedures require more than 48 hours;

13. if too many people must "approve" case statement and promotion materials;

14. if public advocacy of the college's importance and urgency for support is shunned by trustees, top volunteers, faculty and alumni leaders;

15. if the president shunts prospect conditioning and solicitation responsibilities to lowest priority;

16. if business officers interfere in the administration and reporting responsibilities of the development officer;

17. if the case for support is not 100 per cent supported by academic facts, financial integrity, constituency expectancy;

18. if volunteers defer and delay committed responsibilities;

19. if administrative planning for meetings, telephone followups, minutes of meetings, and myriad of details are sloppy, unexecutive and considered unimportant;

20. if meetings, office hours and appointments are not respected sharply;

21. if other administrative responsibilities and/or off-campus counsel jobs interfere with their prime responsibility;

22. if time schedules and goals are not set and adhered to;

23. if staff, or trustee or volunteer ego dominate both experience and judgment;

24. if professional or academic discipline training prevents expansive programs and opportunities;

25. if "I, me, and my" get in the way of "we and us."

Only three or four of the above points refer to dollars directly. But each does indirectly. Confidence in the competence of management is one of the greatest motivators for staff associates, volunteers and donors alike to work, work hard; give and give again.

The achievement of dollar goals is the product of the successful handling of countless details of administration in preparation, implementation and followup. Evaluation of success by dollars alone without consideration of ground prepared for next year is both hollow and invalid. The billiard champion is not so much concerned with the ball at play as he is for setting up his next play.

Evaluation of a development program must include the intangible criteria of pride of accomplishment in preparing for a better, warmer understanding of mission and services of the institution by a larger number of people.

Success is tested in terms of successful communication -- to all constituents. Person-to-person meetings are far more important than countless mailings whether plain or fancy. Personal invitations and prompt, warm thank yous are part of the graciousness in man's dealings with man which has been lost in the race for less personal rewards. In my personal experiences I have been constantly astounded at the gross rudeness of chief executive officers who do not answer their mail at all. Business officers and development officers suffer his malady, too, but top officers have a special responsibility for response as chief executives. The institution's public relations is a constant campaign in putting the best foot forward to present and promote quiet pride in the humanness of the institution.

Success should not be measured by publications that dazzle and defy interpretation. Millions and millions of dollars are wasted in fancy and dramatic publications that neither impress nor inspire confidence of the institution's publics. The ten commandments are beautiful for what they say, not because the stone on which they were written contained precious mica or granite, or that they were designed by a special artist or produced on a four-color, computer controlled ice age. Large gift donors are not impressed with evidence of wastage and most large gifts are inspired by personal discussion and letter followup. More people whould be better informed, interested and concerned and responsive if institutions said less, sent less, but said it well, simply, honestly and creatively.

In summary, the evaluation of a development program is the sum total of a great, great many details. Unappreciated opportunities to interest and impress people abound. These consciously and conscientiously executed continuously will make the dollar objectives for annual and capital giving far easier to achieve and larger endowment possible sooner.

Man holds in his hands through life and hereafter only that which he has given away. Our tests should be the tests of man's love expressed to his fellow man which will provide many warm returns -- even dollars.

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